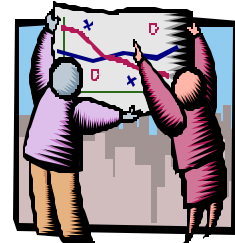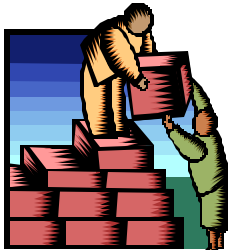# KEY TO THE TOOLBOX:
A PARTICIPANT'S GUIDE TO *MOVING AHEAD*

Introductory
Materials

HEAD START
MOVING AHEAD
COMPETENCY-BASED TRAINING PROGRAM

WELCOME TO *MOVING AHEAD*

Welcome to the Head Start Phase IV *Moving Ahead* competency-based training experience. This innovative approach to professional development for Head Start staff is designed to support competency development or enhancement in skill areas critical to the continued success of Head Start.

The overall objective of *Moving Ahead* is to engage participants in a learning experience that takes a different approach from traditional training programs. The approach has several key features.

1. *It places emphasis on learning versus training*. In a traditional training environment the focus is predominantly on what the trainer provides in the way of information, knowledge, and skill development to the participants. *Moving Ahead* provides a more learner-centered environment in which participants take the primary responsibility for their learning by determining what they need to learn, selecting the appropriate materials, engaging in the learning activities, and planning for continued competency development.
2. It builds on the principles of competency-based learning. *Moving Ahead* incorporates the essential elements of a competency-based approach to training to allow learners to identify learning needs and assess their current knowledge and skill levels as measured against specific job performance requirements, to provide curricula that focus on work-specific situations and incorporate opportunities for participants to learn skills within the context of those work-specific situations, and to establish a structure for continuing knowledge and skill mastery beyond the initial training, through practice and application of knowledge and skills in the workplace
3. *It designs curriculum materials that are responsive to a variety of learning styles and settings*. The *Moving Ahead* materials incorporate readings, activities, and exercises that can be used by individuals or groups, with or without a facilitator.

The following pages provide you with materials you will need to become familiar with the *Moving Ahead* curriculum.

I. IN THE TOOLBOX...

The Moving Ahead toolbox contains master copies of all the materials needed to carry out the training. The materials currently consist of six packets, each one organized around an important job function that Head Start leaders face. Each of these themes is illustrated in a Job Performance Situation case and is used as the jumping-off point for you to build skills in several categories. The themes are

Orienting New Staff

Program Systems and Supporting Fiscal Management

Building Essential Skills in Facilitation, Decision-Making, and Communication

Building Collaboration in Head Start

Promoting the Vision of Head Start

Improving Program Quality through Program Monitoring and Self-Assessment

In addition to these six packets and the skill-building activities associated with each one, there is an activity called Head Start 101. This provides grounding in Head Start history, values, and regulations, and can be used to help you become familiar with the approaches and formats of the activities in the packets.

Exhibit A provides an At-a-Glance Chart of the Job Performance Situations, skill categories, and specific skill-building activities linked to each one. (Note: the Job Performance Situations are currently numbered 1, 2, 3, 4, 5, and 7. These were the Job Performance Situations considered a priority; we may develop other packets in the future.) **Exhibit B** provides a Finding-It-Fast Chart with an alphabetical listing of the skill categories and skill-building

activities, and the related Job Performance Situation. **Exhibit C** provides an overview of the expected participant outcomes for each skill-building activity.

II. HOW DO I KNOW WHERE TO START?

Participants move through a sequential process that includes several phases.

Step 1. Pre-Training Planning for Participants

Before you begin the training, you will receive an introduction to the process. You may take part in a session in which a facilitator walks you through the Competency-based Training (CBT) model, the toolbox, and the materials. You may also participate in the sample activity Head Start 101: History, Values, and Regulations, which will initiate you into the approach and format of the training activities. If this pre-training session is not offered, you can orient yourself to the package by carefully reviewing the steps below.

Step 2. Setting the Context for Competency Development

As the training begins, you will start to use the toolbox materials in a particular sequence.

A. Case and Self-Assessment. Working on your own and at your own pace, you will complete this section, which provides a case—a true-to-life, work-related situation that mirrors what Head Start leaders currently experience on the job. It focuses on a particular aspect of Head Start work (e.g., orienting new staff or promoting the vision of Head Start).

1. You will first read the case, which requires that staff have a distinct set of skill competencies in order to act effectively.

2. You will then answer a series of questions and rate your current skill level for each of the skills needed to address this situation.

3. After rating your skill level for each of the skills in the Job Performance Situation, you will decide which of the skill-building activities in the Job Performance Situation you want to pursue, and you will record your choice in the tally section of the Self-Assessment.

4. After completing the tally section, you will transfer your decision to the Learning Plan that accompanies the Self-Assessment.

If you are completing the Self-Assessment for one specific Job Performance Situation, your task is complete, and you are ready to begin the training activities. If you are completing all six Self-Assessments at one time, you will repeat Steps 1 to 4 for the five remaining Job Performance Situations.

B. Case Activity. If you are completing the training as part of a group experience, you will assemble with other participants who have chosen to work on, say, Job Performance Situation 1, *Orienting New Staff,* and the skills associated with it, into a Job Performance Situation group (or, if working individually, work through the materials on your own). This section offers a structured small group activity, designed to guide you toward considering the challenges of the Job Performance Situation and understanding the importance of developing the related skill competencies. It asks you to draw on your experience to consider how the presence—or absence—of the related skills has affected organizational operations in similar situations.

Step 3. Skill Development

You and other participants from your Job Performance Situation group are now ready to move on to form skill-building groups.

C, D, E, F, and G. Skill-Building Activities. Each of these is a skill-building activity, related to the case in A and B. (The number of skill-building activities varies from packet to packet.) You may decide to choose 1–C, New Staff Orientations. Another participant may choose Leading a Guided Discussion; others may choose Giving Feedback; and still others may choose Developing Learning Plans. You will join with those participants who have selected the same skill-building activity, take up copies of the materials for that activity, and follow the directions.

All the skill-building activities are organized in the same way. Each activity begins with a Reference page that lists skill competencies and cross-references the activity with others in the training curriculum. An Overview specifies the expected participant outcomes, lists materials needed to complete the activity, and itemizes the components with a suggested time frame for each. Each activity uses several types of learning strategies, such as Background Readings, Handouts, and Worksheets. A Worksheet may lead to a pen-and-pencil exercise or possibly a role play or group discussion, and sometimes to an audiotape or a videotape. At the end is a Summary: it reviews critical learnings and asks you to specify how you plan to use those learnings back in the workplace and to identify additional skill development that you may need.

Step 4. Application

Once you have completed all of your selected skill-building activities in your Job Performance Situation, you will reassemble in your original Job Performance Situation group with other members who have taken part in related skill-building activities. (Note: participants who are working alone need to complete all skill-building activities within the Job Performance Situation to be successful in completing the Application Activity.)

X. Application Activity. Pooling your knowledge gained from participation in several skill-building activities, you and other participants apply what you have learned to address the challenges presented in the case. Included in section X is a Post-Assessment. By completing the Post-Assessment and comparing the results to the initial Self-Assessments for the skills linked to this Job Performance Situation, you will get an idea of the skill development you still need to pursue.

Step 5. Planning for Workplace Follow-up and Support

Completing the *Moving Ahead* materials is only an initial step in your skill-development or enhancement process. The next step, that of transferring what you have learned from the curriculum's hypothetical Job Performance Situations to the actual job performance situations you encounter in your workplace, will require thought and planning.

The Learning Plan that you began along with your initial Self-Assessment provides you with space for tracking those *Moving Ahead* activities that you've completed, and for recording next steps that you will take to continue your skill development. These next steps can include repeating selected *Moving Ahead* activities with colleagues, reading more about the topics, and seeking opportunities to practice the skills in a work situation.
The Learning Plan also provides a place to record the types of support you need from your supervisor, co-workers, or others in the workplace. Ways in which others can help you succeed can include monitoring your progress and providing constructive feedback; serving as your mentor or coach for a specific skill; or providing you with opportunities to practice the skill in a structured on-the-job training situation.

Exhibit D presents a flow chart of the sequenced training process.

Exhibit A
At-a-Glance Chart

Head Start 101: History, Values, and Regulations

Job Performance Situation 1: Orienting New Staff	Job Performance Situation 2: Program Systems and Supporting Fiscal Management	Job Performance Situation 3: Building Essential Skills in Facilitation, Decision-Making, and Effective Communication	Job Performance Situation 4: Building Collaboration in Head Start	Job Performance Situation 5: Promoting the Vision of Head Start	Job Performance Situation 7: Improving Program Quality Through Program Monitoring and Self-Assessment
1–A, Case: The Region Self-Assessment	2–A, Case: Child and Family Services Head Start Self-Assessment	3–A, Case: The Hillside Challenge Self-Assessment	4–A, Case: Metro-City Early Head Start Self-Assessment	5–A, Case: Symmington Head Start Self-Assessment	7–A, Case: Harmony Springs Self-Assessment
1–B, Case Activity	2–B, Case Activity	3–B, Case Activity	4–B, Case Activity	5–B, Case Activity	7–B, Case Activity
1–C, Staff Development and Training: New Staff Orientations	2–C, Fiscal Management: Understanding and Applying Basic Cost Principles	3–C, Facilitation: Fundamentals of Leading Meetings	4–C, Collaboration: Managing Your Role	5–C, Conflict Resolution: Understanding the Elements	7–C, Program Monitoring and Self-Assessment: Leading a Program Monitoring or Self-Assessment
1–D, Staff Development and Training: Leading a Guided Discussion	2–D, Fiscal Management: Linking Budget Development to Program Planning	3–D, Decision-Making: Building Consensus	4–D, Collaboration: Negotiating and Formalizing Agreements	5–D, Presentations: Developing Effective Presentations	7–D, Program Monitoring and Self-Assessment: Collecting Data Using Multiple Sources
1–E, Individual Development: Giving Feedback		3–E, Communication: Effective Spoken Communication	4–E, Influencing Others: Applying Basic Skills		7–E, Planning: Using Assessment Data
1–F, Individual Development: Developing Learning Plans		3–F, Communication: Active Listening Skills			
		3–G, Communication: Effective Writing Skills			
1–X, Application Activity: The Region	2–X, Application Activity: Child and Family Services Head Start Program	3–X, Application Activity: The Hillside Challenge	4–X, Application Activity: Metro-City Early Head Start	5–X, Application Activity: Symmington Head Start	7–X, Application Activity: Harmony Springs

Key to the Toolbox

Finding-It-Fast Chart

SKILL CATEGORY	SKILL BUILDING ACTIVITY
Collaboration	4–C, Managing Your Role
	4–D, Negotiating and Formalizing Agreements
Conflict Resolution	5–C, Understanding the Elements
Communication	3–E, Effective Spoken Communication
	3–F, Active Listening Skills
	3–G, Effective Written Communication
Facilitation	3–C, Fundamentals of Leading Meetings
Fiscal Management	2–C, Understanding and Applying Basic Cost Principles
	2–D, Linking Budget Development to Program Planning
Program Monitoring and Self-Assessment	7–C, Leading a Program Monitoring or Self-Assessment
	7–D, Collecting Data Using Multiple Sources
Individual Development	1–E, Giving Feedback
	1–F, Developing Learning Plans
Influencing Others	4–E, Applying Basic Skills
Presentations	5–D, Developing Effective Presentations
Planning	7–E, Using Assessment Data
Decision-Making	3–D, Building Consensus
Staff Development and Training	1–C, New Staff Orientations
	1–D, Leading a Guided Discussion

EXHIBIT C: PARTICIPANT OUTCOMES FOR SKILL-BUILDING ACTIVITIES

1–C, New Staff Orientations
- understand the role and benefits of new staff orientation
- apply a three-step process to the orientation of new Head Start staff
- design an initial orientation session for a new staff person
- assess the effectiveness of new staff orientation efforts

1–D, Leading a Guided Discussion
- Identify opportunities in which a guided discussion is an appropriate staff-development strategy
- develop discussion questions based on learning objectives
- select a discussion stimulus
- use questions, call patterns, body language, and visual aids to manage a discussion
- use a three-step process to respond to incorrect answers
- develop action steps to incorporate what has been learned into ongoing work

1–E, Giving Feedback
- understand the basic principles and guidelines of giving feedback
- determine when feedback is needed
- select the appropriate type of feedback to fit the needs of new staff
- elicit helpful feedback from new staff regarding their orientation experience

1–F, Developing Learning Plans
- identify four types of skills and knowledge needed for a specific position
- assist staff in assessing their own training needs through a questionnaire and an interview
- have information on Head Start staff-development resources
- conduct a staff-development interview
- develop an individualized Learning Plan that contains goals, learning strategies, and action steps
- identify ways to support a staff-development culture in one's organization

2- C, Understanding And Applying Basic Cost Principles
- define programmatic and fiscal intent of basic principles relating to allowable and reasonable costs, direct and indirect costs, allocable costs, and use of non-Federal share resources
- identify sources of guidance for the appropriate application of cost principles
- understand how basic cost principles are applied during program reviews
- demonstrate the application of principles to specific Head Start financial management situations
- determine what constitutes appropriate use of matching funds.
- identify common errors regarding the allocation and use of Federal resources

2- D, Linking Budget Development to Program Planning
- establish a team approach to budget planning and development
- identify and implement critical planning tasks for budget development
- use standard program planning information to establish cost objectives
- select the appropriate budget type to meet program needs
- engage staff in budget monitoring and cost containment

3–C, Fundamentals of Leading Meetings
- describe the elements of facilitation
- understand the strategies and skills required to achieve successful meetings
- apply facilitation skills to a Head Start situation

3–D, Building Consensus
- use a simple framework for conducting consensus-building discussions
- identify common barriers to consensus building
- apply strategies to overcome these barriers
- provide guidelines to assessment team members on ways to prepare for efficient team meetings
- effectively share team decisions with program staff

3–E, Effective Spoken Communication
- determine when the content of a message is clear
- identify any clashes between verbal and nonverbal messages
- recognize when communication is being blocked
- demonstrate how communication can be kept open and moving forward
- identify opportunities for demonstrating respect and building rapport
- recognize when cultural differences and personal factors will impact communication

3–F, Active Listening Skills
- determine one's capacity as an active listener
- demonstrate active listening skills
- employ effective techniques for paraphrasing to clarify meaning
- understand the barriers to active listening

3- G, Effective Written Communication
- understand the importance of good writing skills to their Head Start job functions
- identify areas for improvement in their current style of writing
- set the proper tone for a written document

- select the appropriate wording and phrasing for expressing the intent of specific written documents
- identify and correct common grammar, punctuation, and spelling errors
- determine the appropriate format for note-taking and writing memos, letters, and reports

4- C, Collaboration: Managing Your Role

- define and prepare for the role of the convener, leader, or broker in a collaboration
- assess the developmental stage of an existing collaboration and devise strategies for moving the collaboration forward
- identify potential community partners and strategies for beginning a dialogue with them
- clarify the limits of authority as the organization's representative
- articulate the organization's expectations to partnering organizations
- communicate the benefits and costs of being involved in a partnership

4- D, Collaboration: Negotiating And Formalizing Agreements
- approach negotiations from a win-win perspective
- prepare to negotiate by analyzing their organization's positions, interests, and BATNA (best alternative to a negotiated agreement)
- anticipate their partners' interests and positions
- determine roles on the negotiation team
- follow a six-step negotiation process in a case example
- analyze the completeness of written agreements using a list of common elements

4- E, Influencing Others: Applying Basic Skills
- recognize the value of social marketing as a strategy to improve services for children and families
- identify areas of influence in specific Head Start collaborations
- recognize the importance of successful collaboration of targeted, ongoing communication
- apply a step-by-step process to the promotion of a collaboration
- identify and utilize resources within their own organizations and the wider collaboration to accomplish the work

5–C, Conflict Resolution: Understanding the Elements
- recognize the symptoms, sources, and stages of conflict
- recognize one's personal style for handling conflict
- add new strategies to one's conflict-resolution repertoire
- use a sequential process for assessing and resolving conflicts
- apply conflict-resolution skills to a Head Start situation

5–D, Developing Effective Presentations
- describe the elements of effective presentations
- use two models to plan and design a presentation
- select appropriate visual aids and support materials
- adapt four kinds of charts to use as needed for graphic presentation of quantitative and qualitative data
- practice the three components of good "platform skills"
- apply strategies to overcome speaker fears
- use a checklist to critique a presentation

7–C, Leading a Program Monitoring or Self-Assessment
- articulate a compelling vision for the program self-
- assessment or review both to review team members and
- grantee staff
- develop a plan for achieving the vision
- identify characteristics of strong team members
- create a climate of respect during the assessment
- identify strategies that team leaders can use during different
- stages of team development
- use a formula for responding to staff complaints during a review

7–D, Collecting Data Using Multiple Sources
- describe the strengths and limitations of different data sources in conducting a program review or self-assessment
- conduct a group interview
- build rapport with the person being interviewed
- keep accurate records of interviews
- conduct an observation
- keep accurate records on observations
- analyze and interpret data from multiple sources

7–E, Planning Using Assessment Data to Inform Planning
- identify the three basic elements that make up all types of plans
- use a common planning acronym, SWOT, to analyze assessment data
- distinguish between strategic and operational planning
- develop goals and SMART objectives

EXHIBIT C
FLOW CHART OF THE TRAINING PROCESS

Step 1

Pre-Training Planning for Participants

Informational materials presented to participants to introduce the process

Step 2

Setting the Context for Competency Development

Overview of the Job Performance Situations (A)
- Real-life work situations to guide
  competency development

Complete a Self-Assessment (A)
- Determine competency development needs

Develop a Learning Plan
- Identify skill-building activities

Review and discuss Job Performance
Situation Cases (B)
- Deepen understanding of link between
  competency and job performance

Step 5

Planning for Workplace Follow-up and Support

Plan for continued development and use of skills in the workplace

Step 4

Application

Participate in Application Activity (X)
- Apply skills learned
- Post-Assessment

Step 3

Skill Development

Participate in skill-building activities
- Engage in skill building (C, D, E, F, and G)